

**2004 Community Services Workshop
Enhancing Performance, Perfecting Our Game!
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Peer-to-Peer Exchange – A Review of Assurance 16 & Outreach Services

Panelists:

Kathy Kifaya (Community Action Partnership of Orange County)
Linda McQueen (North Coast Energy Services)
Jean Warren (Central Valley Opportunity Center, Inc.)

Community Action Partnership of Orange County

Assurance 16 Services: In 1986, CAPOC launched Orange County's first countywide, generic and comprehensive Information and Referral Phone Program. Our Client Info Line is open from Monday to Friday (8 am to 5 pm) throughout the year, and tracks over 60,000 calls annually. Since 2000, call volume passed the 100,000 mark due to California's energy crisis. In 2003, staff answered almost 87,000 calls for help.

In 80% of the cases, it is a low-income caller in need of some type of assistance with their utility bills, for food, rent, clothing or financial help. Once the problem is identified, call staff screen and qualify each caller in need of assistance for CAPOC programs such as HEAP, FT, WX and other services. If not eligible, the caller is referred to another service organization that will hopefully meet their need. When the pre-screening/assessment is completed, prospective clients are given an appointment at one of 13 site locations in 11 cities throughout North, Central and South Orange County.

During the verification process, the phone pre-screening needs/eligibility form is reviewed and signed; LIHEAP Intake Forms are completed, written verification of eligibility and signatures obtained, and all required back up documentation is copied to create a client record. During the interview, the client receives pertinent information about their program: WX measures and energy education/budgeting books/consumer materials (via workshop and/or one-on-one counseling) and more referrals if needed.

Staff contact utility companies through faxes, phone calls and mailings to verify the client energy usage, bill amount and/or to advocate for reduced deposits, waiver of delinquent fees or charges of their bill. Additionally, the client is enrolled in CSFP Food Box, CARE and/or ULTS discount programs (if eligible) to help further reduce their monthly food, energy and/or telephone bill burdens. Clients receive written receipts and other correspondence explaining the help received so that the client understands what has transpired. Since 1989, CAPOC staff have operated the county-wide Emergency Food & Shelter (FEMA) Clearinghouse which tracks all local clients utilizing rent and utility funding as well as GAF/EAF Funded agency.

Outreach Services: A Field Services outreach team established in 2000 has primary responsibility for conducting and coordinating all outreach activities annually throughout the County. Currently, HS/WX Director manages and provides oversight to the Program

Manager and 6 Outreach Coordinators. Coordinators staff the 13 outstations throughout Orange County, providing services in local community centers. One Stop Offices in 11 cities spanning from La Habra to the north, to San Clemente to the south, to Los Alamitos to the west, and Santa Ana to the central east.

Additionally, home visits and mail applications provide accommodation for any eligible client needing special assistance. A host of materials are used for conducting outreach and community education throughout the year, including: pens, pencils, mailers, posters, flyers and brochures. Staff also outreach through networking meetings, collaboratives and making presentations at churches, schools, CBO's, Faith-Based organizations, government welfare/social security offices, foreign consulates, WIB/One Stop Center-job fairs, college information fairs, and neighborhood association meetings to name a few.

North Coast Energy Services

Assurance 16 Services: The first priority is always to do a thorough energy education to help the client reach an understanding of the importance of energy conservation and the effect of energy costs on their budgets. The second is to do a needs assessment and determine what assistance our programs are able to offer and what other programs they can be referred to.

Outreach Services: Outreach workers visit various Senior Centers and Head Start locations to explain our programs and the benefits that we can offer them. We explain the benefits of energy conservation and having the home weatherized. We have educational materials printed and distributed. At Halloween we have Halloween bags printed and distributed to Head Start locations. We do advertising and PSA's on the radio and printed advertising in the local newspapers. We also meet with various realtors and property managers.

Central Valley Opportunities, Inc.

Assurance 16 Services: At the time of application, staff provide payment needs assessment, budget counseling, energy conservation education information, and coordination with local utility providers' energy saving programs, such as PG&E, MID and TID Care programs; and levelized payment plans and payment arrangement services, as well as referral to other energy assistance programs such as REACH.

Outreach Services: Outreach activities for CVOC services are performed on an on-going basis utilizing various media sources, i.e. television, radio and newspaper ads, flyers, and public presentations. CVOC also conducts public information sessions at various locations and to low-income target groups. CVOC has regular schedules at various sites throughout the county to provide HEAP and ECIP services, such as Turlock EDD, Westside Resource Center. Staff schedule home visits at senior citizen housing complexes throughout the county. In coordination with local utility companies, CVOC receives referrals from MID, TID and PG&E when clients have contacted them for utility payment resources, as well as from other service agencies and groups. The CVOC website offers an information request feature which can be used by the general public to access information on energy programs. Clients seeking other services at CVOC Centers are referred to the energy assistance programs when it is determined that they may qualify for assistance.

BEST PRACTICES - Energy

Central Valley Opportunity Center

Presenter – Jean Warren, CVOC Program Manager

Agency Summary

Central Valley Opportunity Center is a private non-profit agency with offices and vocational training facilities in the counties of Madera, Merced and Stanislaus counties. CVOC has the designation of Community Action Agency in Stanislaus County and a District II - Migrant and Seasonal Farmworker Set-a-Side for Madera, Merced, Stanislaus, Tuolumne and Mariposa Counties. As the Community Action Agency for Stanislaus County, CVOC is the recipient of the Low Income Home Energy Assistance Program (LIHEAP).

Processes and Procedures:

CVOC operates a centralized Energy Assistance Department. The Energy Department provides all Outreach, Intake, Assurance 16 Activities (Assessment, Energy Education – Counseling and Coordination with Utility Companies and other utility payment programs) and Intake/Referral to the Weatherization services. In order to serve the entire county the staff of the Energy Assistance Department travels to a variety of locations throughout the county on a regularly scheduled basis. Through arrangements with local agencies, such as EDD, Westside Resource Center, various senior centers, etc, CVOC is able to set-up shop on the scheduled days and provide Energy Assistance in the rural communities.

CVOC staff provides all Energy services to each client on an individual basis. CVOC's philosophy for providing the services in this way is to:

- Insure the clients' confidentiality.
- Provide a full assessment of the client's energy problems and offer solutions that directly address their individual and unique situations.

- Provide quality service, which meet the contract requirements.

The following is a summary of the processes and procedures for each of the various LIHEAP Activities, focusing on the Outreach and Assurance 16 Processes and Procedures:

OUTREACH

Outreach methods include the standard use of media, i.e., newspaper, radio etc, when necessary, however, CVOC has always received more requests for services than funding. CVOC instead focuses on outreach to areas and clients who have been under-served. The outreach methods to reach these clients are presentations at civic group, i.e., senior citizen groups, service clubs, social service agencies, etc, referrals from other agencies, and referrals from utility companies.

CVOC works with MID and TID's Public Benefit Program staff. Both agencies are operating campaigns to inform residents of their CARE (reduced rate programs) and CVOC staff are actively involved in outreach for HEAP and ECIP programs in conjunction with these 2 utility companies.

ASSURANCE 16

Assessment

Our Assessment process begins with the determination of vulnerable population and priority points for service based on those contained in the contract. Using the formula, staff prioritizes the applications based on the number of priority points. The applicants with the highest priority points are those to be served first. CVOC does not serve client who receive 0 priority points. In order to serve very low-income clients, CVOC has an agency defined priority point. Very low-income clients who may have no priority points in the CSD defined categories; receive 1 priority point if their annualized income is below the Poverty Level.

Energy Education

Our Energy Education consists of a personal counseling session with the CVOC Intake Counselor. The CVOC staff provides the following:

- Provide each client with an Energy Education Pamphlet and review the highlights of this document with the client.
- Discuss the importance of the home weatherization and complete an application for the CVOC Weatherization services.

- Inform the client of programs offered by the utility companies and provide handouts explaining these services.
- Determine if the client is enrolled in any reduced rate programs offer by either MID, TID or PG&E and complete an application for these program if the clients qualify.
- Assist the client in completing the Budget Counseling form and review this document with the client.
- Provide referral to other energy assistance program/s.

Coordination with Utility Companies

CVOC works very closely with the local electric provider utility companies, Modesto Irrigation District and Turlock Irrigation District. Currently, both these utility companies contract with CVOC under their Public Benefit Program to provide Weatherization Services and CARE Program Outreach. CVOC has been contracting with PG&E for the CARE program outreach. In addition to the utility coordination described in the previous section, CVOC performs the following coordinating activities:

- Assists the clients in making Payment arrangements with the utility companies.
- Performs payment verification on Shut-off (ECIP).
- Provides information on Payment Plans, i.e. levelized payments.

Challenges and Solutions

- Many of the same clients apply for the HEAP and ECIP payment assistance year after year and expect to receive the payment. Most of these repeat customers do not want to go through the counseling sessions and/or refuse to participate.

There is no solution to this issue. CVOC attempts to work with the clients and perform all required elements, but in some cases when client are not cooperative, they cut the presentation short and provide handouts only.

- The Intake, Assessment and Counseling are time consuming.

CVOC has considered having group sessions, but the logistics has presented a couple of barriers to making this change.

- Client complaints - Clients who are denied service for whatever reason, tend to voice the complaints to the local officials. If our contract does not start promptly on the 1st working day of January, we are bombarded with calls. Clients who expect to be assisted immediately, regardless of when they call.

CVOC probably receives more client complaints from operation of this program than from any other. There are those clients who remember when the HEAP applications were mailed to them and all they and all they had to do was mail it in. Clients complain that they cannot an immediate appointment. To deal with these, the staff is directed to refer any complaints to the Program Manager. In most cases, discussions with the clients resolve their concerns. Clients who wish to file a written complaint are provided the procedure in writing

- Funding is not adequate to pay for the staff needed to provide all of the services required by the contract.

CVOC supplements the operation of the LHEAP program with other funds, however, this is not really a solution, only a band aide to be able to provide adequate staffing, management and administration to operate the program as required by the contract and provide the needed service to our clients.

NOTES: